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July 1992

TOP 100

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Who are the top jobbing and retail chains?

Chilton's
AUTOMOTIVE MARKETING

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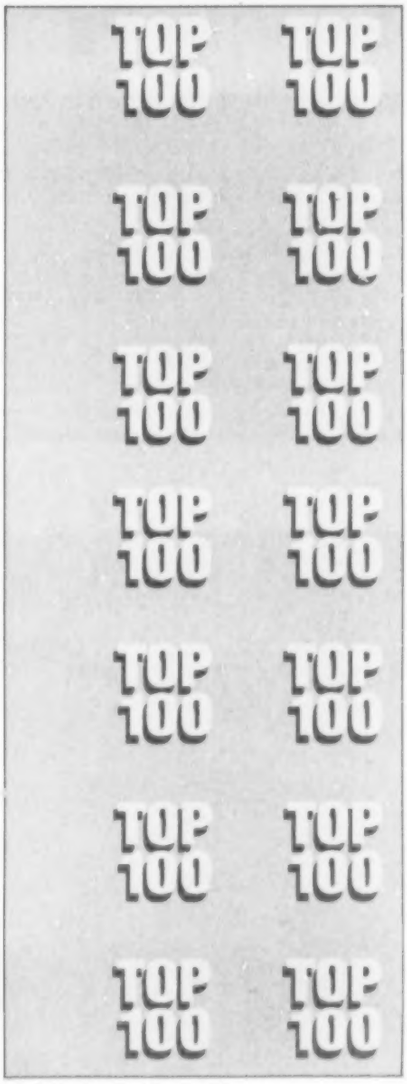

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BPA

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TOP 100

Who are the top jobbing and retail chains?

Some numbers among the largest 100 aftermarket chains have continued to grow despite the economy.

by **Phil Katcher,** Business Editor

Despite all the "gloom-and-doom" talk about the aftermarket and general economy in the last year, in all the 100 largest aftermarket store chains who reported their annual figures to us had an estimated 117 more stores than they did in 1990, with another 46 more service bays this year than last.

However, the economy's ugly head was seen in the fact that sales fell off $265,541 in the estimated sales volumes from 1991 against 1990. Since both figures included a number of sales volumes *Automotive Marketing* estimated, based on previous sales figures and store numbers and types, such a small number should be considered not especially firm. Instead, it is more indicative of what was essentially a flat market.

Indeed, according to the Lang Marketing Resources (Wyckoff, NJ), the annual rate of growth for jobbers from 1990 to 1991 was only 0.79%. This compares to a 1.54% growth rate for 1990 and a 3.13% growth rate for 1989.

Given this slow to no overall growth rate, it's no surprise that the chains we surveyed—over a thousand for this listing—didn't grow that much during 1991. Indeed, the trend among aftermarket chains has been generally towards downsizing, closing unprofitable stores to concentrate on the winners.

Probably due in good part to these store closings, at the same time, reported sales per store in the chains which reported overall annual sales rose. In 1991 the aftermarket reached the point where the average store is worth around a million dollars in sales. The "million dollar store" has long been an aftermarket objective and now it's apparently an industry-wide reality.

As well, in the past there have been many changes in CEOs' names, proof of the furious personnel changes of the Reagan era. This year, companies seem to have stuck with tried and true management while individuals stuck close to companies in which they had a history.

Therefore, this year's list shows few changes—and no surprising changes—from last year's list. Again, retail chains dominate the beginning of the list, while jobber chains tend to be found more towards the end of the list. Percentages of retail vs. wholesale sales run around the same this year as last, as do the companies which offer professional installation and service. Basically, a large part of the fact that there were more service bays this year than were listed last year is because one chain which has an extensive service operation appeared on this year's list for the first time. Before this the chain had not reported enough stores to appear on the list.

This year information on which chains belong to which programmed distribution groups has not been provided. In the past, most chains told us what groups, if any, to which they belonged. However, a handful ignored our request for this information, something which bothered the groups who naturally enough want their full memberships reflected in the list.

Finally, there was apparently some more reluctance among companies to give information about themselves. One major company's CEO even hesitated to tell us his company's new ZIP code. ■

FASTEST GROWING CHAINS

As may have been expected, in the second year of a deep recession, most chains did not report serious growth in the number of stores they operated in 1990 vs. 1991. Indeed, most had consolidated a bit, closing unprofitable stores in order to operate more efficiently.

So, where the fastest growing chain in 1991 had 45% more stores in 1990 than 1989, the fastest growing chain in 1992 had only 23% more stores than the year before. Still, in a year of virtually no growth across the entire aftermarket industry, such a growth is pretty dramatic stuff. As is the addition of 122 stores to these ten chains.

While the fastest growing chain is a jobber chain, it's interesting that most of the rest of the fastest growing chains were essentially retailing organizations targeting DIYers as their prime customers. Last year, the list was a bit more evenly divided between pure retailers and jobbers or jobber/retailers.

THE *AM* TEN FASTEST GROWING CHAINS, 1991-1992
(The fastest growing chains, in terms of total stores listed in the July 1991 Top 100 list and this list.)

#	Chain	1991 List #	1992 List #	1991 Stores	1992 Stores	Total Growth	% Growth
1.	Automotive Supply Assoc.	64	44	23	28	5 stores	22%
2.	ADAP (Rite Aid)	24	22	79	89	10 stores	13%
3.	Big Wheel/Rossi	38	34	40	45	5 stores	13%
4.	The Pep Boys	7	6	313	340	27 stores	9%
5.	HI/LO Auto Supply Companies	19	20	108	118	10 stores	9%
6.	AutoZone	3	2	570	618	48 stores	8%
7.	One Stop Auto Parts	61	48	24	26	2 stores	8%
8.	PACCAR	14	16	130	138	8 stores	6%
9.	O'Reilly Automotive (Ozark)	18	18	115	122	4 stores	6%
10.	Forest City Auto Parts Co.	31	31	51	54	3 stores	6%
	TOTAL ADDITIONAL STORES					122 stores	

ACTUAL REPORTED SALES

Most aftermarket chains, both pure retail and jobber, it must be admitted, are privately held and will not tell even their best friends what their annual sales figures are. Therefore, this list reflects only the handful which are required to by law, since they offer public stock sales, and those who are simply not afraid to.

The interesting thing, then, is that each year this list is basically the same as the previous year, so it can be compared from year to year to see some overall aftermarket trends. This year, during which everyone has been crying the blues because of the poor overall economy, has actually seen a rise in the overall sales of the ten largest chains reporting actual sales. Indeed, there's been a 12% higher total reported. However, the actual numbers showed only $396,065 more in sales for 1991 than were made in 1990.

THE *AM* TOP TEN CHAINS REPORTING ACTUAL SALES
(Showing percentage of retail sales)

List #	Chain	100 List #	Sales (+000)	Address and phone number
1	The Pep Boys	6	1,001,508	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000
2	Northern Automotive	1	707,000	645 Missouri Ave., Suite 400, Phoenix, AZ 85012 (602) 265-9200
3	Genuine Parts	3	616,000	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700
4	AutoZone	2	412,867	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600
5	Trak Auto	7	319,635	3300 75th Ave., Landover, MD 20785 (301) 731-1200
6	PACCAR	15	195,000	1400 North 4th St., Renton, WA 98055 (206) 251-7600
7	O'Reilly Automotive	18	100,000	233 S. Patterson, Springfield, MO 65802 (417) 862-3333
8	Parts Plus Autostore	16	98,000	601 S. Dudley, Memphis, TN 38104 (901) 523-7711
9	ADAP (Rite Aid)	22	84,804	660 Bodwell St., Ext. Avon, MA 02322 (617) 587-8400
10	Sieg Auto Parts	17	46,000	400 N. Main St., Davenport, IA 52801 (319) 323-3641
	TOTAL SALES		3,580,814	

THE 1992 *AM* LARGEST 100 AFTERMARKET CHAINS

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)	CEO	Address and Phone	% of DIY
1	Northern Automotive [1]	801	0	707,000	Julius Trump	645 Missouri Ave., Suite 400, Phoenix, AZ 85012 (602) 265-9200	95%
2	AutoZone	618	0	412,867	Peter Formanek	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600	95%
3	Genuine Parts	616	0	616,000	Tom Gallagher	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700	30%
4	Chief Auto Parts Inc.	524	5	380,000*	Mike Manor	15303 Dallas Pkwy, Ste 800, Dallas, TX 75248 (214) 404-1114	95%
5	Western Auto [2]	517	3,185	1,310,000*	John T. Lundegard	2107 Grand Ave., Kansas City, MO 64108 (816) 346-4000	95%
6	The Pep Boys—Manny, Moe & Jack	340	2,400	1,001,508	Mitchell G. Leibovitz	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000	99%
7	Trak Auto	333	0	319,635	Herbert H. Hafl	3300 75th Ave., Landover, MD 20785 (301) 731-1200	95%
8	WSR [3]	332	168	330,000*	Alfred Woods	9A Brickplant Rd., South River, NJ 08882 (908) 390-9000	95%
9	Nationwise Automotive, Inc.	290	340	290,000*	Saul Levy	3750 Courtright Ct., Columbus, OH 43227 (614) 239-1111	95%
10	Advance Stores Co.	200	0	200,000*	Nicholas Taubman	1342 West Eighth, Roanoke, VA 24015 (703) 345-4911	99%
11	Super Shops	162	385	200,000*	Harry Eberlin	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660 (714) 644-9900	95%
12	Fisher Auto Parts	161	0	160,000*	Art Fisher	512 Greenville Ave., Staunton, VA 24401 (703) 885-8901	20%
13	Discount Auto Parts, Inc.	150	0	150,000*	Denis L. Fontaine	4900 Frontage Rd. South, Lakeland, FL 33802 (813) 687-9226	99%
14	General Parts	142*	0	142,000*	Temple Sloan	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813	20%
15	PACCAR [5]	138	600	195,000	David J. Hovind	1400 North 4th St., Renton, WA 98055 (206) 251-7600	99%
16	Parts Plus Autostore (Parts, Inc.)	138	12	98,000	Mike Grisata	601 S. Dudley, Memphis, TN 38104 (901) 523-7711	35%
17	Sieg Auto Parts	126	0	46,000	Madis Suig	400 N. Main St., Davenport, IA 52801 (319) 323-3641	5%
18	O'Reilly Automotive (Ozark)	122	0	100,000	Charles O'Reilly	233 S. Patterson, Springfield, MO 65802 (417) 862-3333	50%
19	APS (Big A Auto Parts)	120	0	120,000*	Richard J. Speller	3000 Pawnee St., Houston, TX 77054 (713) 741-2470	33%
20	HI/LO Auto Supply Companies	118	0	142,500*	T. Michael Young	8601 Tavenor Lane, Houston, TX 77075 (713) 991-6052	78%
21	Strafco Inc.	94	35	75,000*	David J. Straus	POB 600, San Antonio, TX 78292 (512) 226-0101	30%
22	ADAP (Rite Aid)	89	0	84,804	Wayne Yodzio	660 Bodwell St., Ext. Avon, MA 02322 (617) 587-8400	99%
23	Aid Auto	88	0	55,000*	Philip L. Stephen	POB 281, Westbury, NY 11590-0281 (516) 338-7889	95%
24	Republic Auto	80	0	40,000	Keith Thompson	POB 2088, Brentwood, TN 37024 (615) 373-2050	40%
25	Advantage Auto Stores (Hahn)	75	0	73,000*	Mike Futerman	415 W. Main St., Rochester, NY 14608 (716) 235-1595	40%
26	Parts Depot/Steego Auto Parts	72	0	40,000	Rollance Olson	2177 Dale Ave., Roanoke, VA 24013 (703) 345-1001	40%
27	Crow-Burlingame	71	0	34,000	Fletcher Lord, Jr.	520 W. Capital, Box 111, Little Rock, AR 72203 (501) 372-5275	25%
28	A.I. Automotive	68	0	70,000*	Stuart Baxter	4105 S. Creek Rd., Chattanooga, TN 37406 (615) 622-6274	30%
29	Hi-Gear Tire & Auto Supply	65	0	65,000*	Abe Shuster	110 Ritchie Rd., Capitol Heights, MD 20743 (301) 336-3000	99%
30	Quality Stores	61	100	200,000	John L. Hilt	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491	95%
31	Forest City Auto Parts Co., Inc.	54	0	65,000*	Arnold Bellowe	25201 Chagrin Blvd., Ste 350, Beachwood, OH 44122 (216) 292-2525	90%
32	Brooks Auto Parts/Supply	51	0	50,000*	Elton D. Brooks, Jr.	402 S. Peterson Ave., Douglas, GA 31533 (912) 384-7818	45%
33	Kentucky Motor Service (KOI)	50	0	57,000*	Anthony W. Neltner	POB 395, Covington, KY 41011 (606) 431-6025	30%
34	Valley Motor Supply	46	0	40,000	Allen Dedman	2635 S. Belknap Ave., Billings, MT 59107 (406) 259-4577	30%
35	Big Wheel Auto/Rossi Stores	45	0	33,000	R.B. Shaller	2300 P. Lot Knob Rd., Mendota Heights MN 55120 (612) 452-7484	95%
36	Champion Auto Stores [7]	45	90	100,000*	Dene E. Bilbe	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 535-5984	95%
37	Murray's Discount Auto Stores	40	0	40,000*	Albert Pitt	21500 Trolley Ind. Dr., Taylor, MI 48180 (313) 292-2800	90%
38	Pettigrew-Smith/Dale's	37	0	33,000*	Bob Merrill	8119 Jensen Dr., Houston, TX 77093 (713) 695-3613	95%
39	Ace Auto Parts	35	0	28,000	Jeff Huenink	4750 118th Ave., N., Clearwater, FL 34622 (813) 573-2800	45%
40	Anderson Auto Parts	35	0	21,000	H.G.Anderson III	POB 767, Anderson, SC 29622 (803) 224-6321	50%
41	The Carport (Harco Drug)	34	0	20,000*	David Fuhrman	3925 Rice Mine Rd., Tuscaloosa, AL 35406 (205) 345-2400	85%
42	Davis & Wilmar	33	4	19,500*	Gary Davis	609 Epsilon Dr., Pittsburgh, PA 15238 (412) 963-7776	35%
43	Keenan Auto Parts	32	0	16,000*	Frank Ahouse	112 N. Front St., Albany, GA 31703 (912) 432-6241	5%
44	Benny's	29	12	25,000*	Malcolm C. Bromberg	340 Waterman Ave., Esmond, RI 02917 (401) 231-1000	95%
45	Twin "B" Auto Parts	29	0	16,000	William O'Connor	528 S. Military Hwy., Virginia Beach, VA 23464 (804) 420-3342	99%
46	Wheels Discount Auto Stores (Fay Drugs)	28	0	33,000	Gale Mitchell	4577 Buckley Rd., Liverpool, NY 13088 (315) 652-7000	95%
47	Automotive Supply Asso. Inc. (SAS Auto Parts Co.)	28	0	29,000	George Segal	129 Manchester St., Concord, NH 03301 (603) 225-4000	25%
48	Linkon's Auto Supply	28	0	25,000*	Leonard Linkon	2720 E. 2nd St., Centralia, IL 62801 (618) 533-1311	50%
49	Ben Pilla Speed Shops	26	2	12,000*	Ben Pilla	118 N. Black Horse Pike, Bellmawr, NJ 08031 (609) 931-4041	95%
50	J. Burdman Auto Parts	27	0	5,000	Larry Lamberson	801 N. Franklin St., Kirksville, MO 63501 (816) 665-3787	15%

* Automotive Marketing estimate for 1992.
[1] Includes Checker/Schuck's/Kragen, Auto Works, U Save, and Crown Auto.
[2] Includes company-owned stores only with tire stores included.
[3] Includes Giant Auto, Motormart, National Auto, Rose Auto, R&S Strauss, and Strum Auto.
[4] Includes National Automotive Superstores, Save Auto Stores.
[5] Includes Al's Auto Supply and Grand Auto.
[6] Includes Fischer's Auto Parts.
[7] Includes company-owned stores only; with franchises total is much greater.
[8] Includes All Parts Automotive, Inc., Short's Auto Parts, Tony's Parts & Accessories.

TOP RETAIL CHAINS

Among the largest chains that specialize in selling to the DIY customer, there's a new face this year which is actually an old face with a new name. It's WSR, which is made up of Whitlock, Rose, and R&S/Strauss. This combination made the 1989 Top 100 list as the seventh largest chain under the name of its then British owner, the Ward White Group. However, last year, it was broken down into its components, following its management reorganization and sale to American owners.

Because of the addition of WSR, Discount Auto Parts, which had been on the 1991 list of ten largest retailers, did not appear on the current largest ten list. The chain is, however, still one of the largest players in the field.

Other than that, in a year of slight changes and slow growth, the 1991 and 1992 lists are virtually identical.

THE *AM* TOP TEN RETAIL CHAINS

(Chains doing 90% or more retail/DIYer sales, based on their reported number of stores; showing their place on Top 100 list.)

List #	Chain	100 List #	% DIY	Address
1	Northern Automotive	1	95%	645 Missouri Ave., Suite 400, Phoenix, AZ 85012
2	AutoZone	2	95%	3030 Poplar Ave., Memphis, TN 38111
3	Chief Auto Parts Inc.	4	95%	15303 Dallas Pkwy, Ste 800, Dallas, TX 75248
4	Western Auto	5	95%	2107 Grand Ave., Kansas City, MO 64108
5	The Pep Boys	6	99%	3111 W. Allegheny Ave., Philadelphia, PA 19132
6	Trak Auto	7	95%	3300 75th Ave., Landover, MD 20785
7	WSR	8	95%	9A Brickyard Rd., South River, NJ 08882
8	Nationwise Automotive, Inc.	9	95%	3750 Courtright Ct., Columbus, OH 43227
9	Advance Stores Co.	10	99%	1342 West Eighth, Roanoke, VA 24015
10	Super Shops	11	95%	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660

THE 1992 *AM* LARGEST 100 AFTERMARKET CHAINS

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)	CEO	Address and Phone	% of DIY
51	Barnes Motor & Parts Co. Inc.	27	0	24,000*	Robert E. Kirkland, Jr	315 E. Barnes St., Wilson, NC 27893 (919) 243-2161	25%
52	One Stop Auto Parts	26	0	20,000	Gerald Klein	1113 62nd Ave. N., St. Petersburg, FL 33702 (813) 522-2897	90%
53	Parts City, Inc. (Alex. Seewald)	26	0	13,000	R. Jack Alexander, III	515 Wharton Circle, S.W., Atlanta, GA 30336 (404) 352-0146	99%
54	Auto-Wares	25	0	60,000	Fred A. Bunting	440 Kirtland, S.W., Grand Rapids, MI 49507 (616) 243-2125	30%
55	ITM Automotive Parts	25	0	26,000	John Kenney	13140 Alondra Blvd., Cerritos, CA 90701 (213) 926-6582	35%
56	Motor Bearings & Parts Co. (CJS, Inc.)	25	0	12,000	Bill White	427 S. Dawson St., Raleigh, NC 27602 (919) 832-3961	27%
57	Bennett Auto Supply, Inc.	24	0	24,000	Allen Bennett	1099 E. Oakland Park Blvd., Oakland Park, FL 33334 (305) 565-4636	50%
58	Automotive One Parts Stores	24	0	15,000	Robert H. Gentry III	701 W. Church St., Orlando, FL 32802 (407) 422-1110	45%
59	Belbro Discount Auto Parts (Alabama Crankshaft & Engine)	24	0	11,000	Bert Seigel	1432 Mims Ave., Birmingham, AL 35215 (205) 925-4616	40%
60	Himel Auto Parts/Motor Supply	23	0	26,000	Kent Himel	318 W. Simcoe St., Lafayette, LA 70501 (318) 235-1556	30%
61	Mid-State Automotive	23	0	23,000*	Phil Brandenburg	POB 555035, Orlando, FL 32855-5035	35%*
62	Allied Auto Parts Co.	23	0	14,000*	Daniel Sennet	43 N. Montello St., Brockton, MA 02401 (508) 588-8500	30%
63	Kirkham Auto Parts	23	0	10,000	Michael Kirkham	POB 718, Blackfoot, ID 83221 (208) 785-2902	50%
64	AEW (DAPS)	22	0	25,000	Martin Sharron	604 N. Pace Blvd., Pensacola FL 32505 (904) 434-6484	75%
65	Beacon Auto Parts Co.	22	0	22,000	Fred J. Pisciotta	6013 Enterprise Dr., Export, PA 15632 (412) 733-7077	35%
66	Foreign Autopart Inc.	22	0	21,000	Steve Patkin	1205 Route One, Sharon, MA 02067 (617) 784-1111	30%
67	VIP Discount Auto Center	21	69	20,500	Thomas O. Auger	12 Lexington St., Lewiston, ME 04240 (207) 784-5423	99%
68	Acme Auto Supply, Inc.	21	0	20,000	James Fine	620 R. Oakwood Ave., West Hartford, CT 06110 (203) 246-2540	30%
69	Cardis	21	0	19,000	Kenneth D. Walker	6240 Desconso, Buena Park, CA 714-739-5561	40%
70	All-Car Automotive Centers	20	44	20,000	Lester R. Cigel	1520 S. Superior Ave., Antigo, WI 54409 (715) 623-3791	80%
71	Arnold Motor Supply	20	0	16,500	Milo Allen	110 W. 4th, POB 5008, Spencer, IA 51301 (712) 262-4287	20%
72	Royal Auto Supply	20	0	15,000	Jon Sienn	Twin Park Industrial Center, Colmar, PA 18915 (215) 822-1359	95%
73	Sturdevant's Inc.	20	1	14,000	Jack Sturdevant	POB 948, Sioux Falls, SD 57101 (605) 336-0678	30%
74	688 Parts Service, Inc.	20	0	12,000	George E. Tricou Jr.	9126 Green Springs Rd., Baton Rouge, LA 70821-1749 (504) 924-6886	25%
75	Erlich/Airland Auto Parts [11]	20	0	18,000*	Herbert August	POB 277, Albany, NY 12202 (518) 449-1176	40%
76	Gatling's Auto Stores	20	5	10,000*	Albert C. Premus	117 W. Peach St., Connellsville, PA 15425 (412) 628-3340	90%
77	The Flowers Co.	19	0	12,000	John R. Flowers	POB 1118, Hickory, NC 28603 (704) 322-5414	25%
78	Lee's Parts Plus Autostores	19	0	10,000	John Lee	POB 700, De Kalb, TX 75559 (903) 667-2541	40%
79	Molin Auto	18	0	23,000	Kim E. Molin	3896 Union Rd., Buffalo, NY 14225 (716) 633-4455	15%
80	Auto Parts World	18	0	16,000*	Andrew Dabrowski	1176 W 14 Mile Rd., Clawson, MI 48017 (313) 288-0845	90%
81	Rodefeld's	18	0	12,000	Charles A. Rodefeld	96 W. Main, Richmond, IN 47374 (317) 935-7626	50%
82	Milford Auto Parts	17	0	17,000*	Marc Mann	POB 519, Woonsocket, RI 02895 (401) 769-7628	40%
83	National Auto Supply	17	0	17,000*	Clifford Shanfeld	8514 Eager Rd., St. Louis, MO 63144 (314) 968-8511	5%
84	H.E. Everson Auto	17	0	8,000	Kirk Sand	2904 Gateway Dr., Grand Forks, ND 58201 (701) 772-4839	25%
85	National Auto Stores	16	0	11,000	David M. Stein	2342 North Penn Rd., Hatfield, PA 19440 (215) 997-1300	70%
86	E. Blankenship & Co.	16	0	8,500	Clarence "Penny" Bagby	704 W. Main, Marion, IL 62959 (618) 993-2643	30%
87	Main Auto Parts	16	0	16,000*	Bart Weprin	1422 N. Main, Dayton, OH 45405 (513) 277-7393	20%
88	Gillman Auto Parts	15	150	30,000	Ramsay Gillman	7611 Bellaire, Houston, TX 77036 (713) 776-7000	10%
89	Parker Auto Supply	15	0	15,000*	W.W. Parker	POB 760, Sumter, SC 29151 (803) 775-6721	10%
90	Von Housen Auto Parts	15	0	12,000	Robert Neeley	2633 Alta Arden, Sacramento, CA 95825 (916) 362-0691	50%
91	Jarvis Supply Co.	15	0	11,000	Chris Jarvis	516 Main St., Winfield, KS 67156 (316) 221-3113	25%
92	Auto Parts of Wichita	15	0	9,000	Dennis Stein	1111 S. Rock Rd., Wichita, KS 67207 (316) 685-6242	40%
93	BWP [7]	14	0	26,000*	Neil Stokel	1055 Bronx River Ave., Bronx, NY 10472 (212) 991-9000	1%
94	Motor Supply Warehouse	14	0	25,000	Beryle M. Blanchard	1502 13th St., Box 7, Belle Plaine IA 52208 (319) 444-2754	30%
95	Scherbas Auto Stores, Inc.	14	0	16,000	Ted R. Scherba	POB O, CA 94402 (415) 342-9415	60%
96	Southern Auto Supply	14	0	14,000	Don W. McMurtrey	200 Sonora St., Bakersfield, CA 93303 (805) 327-0288	35%
97	Parts Wholesalers, Inc.	14	0	14,500*	John B. Darling	POB 1239, Bangor, ME 04401-1239 (207) 941-1230	30%
98	Hapco Auto Parts	14	0	10,000	Richard Halpern	POB 311, Hoyoke, MA 01041 (413) 538-8225	25%
99	Darling's Auto Parts	14	0	10,000	Earl G. Seymour	155 Perry Rd., Bangor, ME 04401 (207) 941-1230	35%
100	Bond Auto Parts, Inc.	14	0	8,000	George F. Bond	45 Summer St., Barre, VT 05641 (802) 476-3108	35%
	TOTALS	8,391	7,602	9,025,814*			

* Automotive Marketing estimate for 1992

[7] Includes company-owned stores only; with franchises total is much greater

TOP JOBBER CHAINS

We've merged the lists we produced last year of top jobber chains and program members because essentially they're the same list. NAPA (Genuine Parts), Federated (Fisher and Sieg), Carquest (General Parts and Stafco), Big A (APS), and Auto Value (Advantage) are represented by chains here which own stores selling to professional installer customers.

As well, in this period of the whole aftermarket merging into one identity, these chains also have significant retail sales. Indeed, most make at least a quarter of their sales to walk in trade, mostly DIYers searching for parts that aren't usually stocked in their local discount stores. Indeed, only Sieg of the whole list says that their sales to non-professional customers are minimal at best. Even so, they all define themselves as being in the jobber end of the aftermarket, rather than being retailers *per se*.

THE *AM* TOP TEN JOBBER CHAINS

(Chains doing 60% or more wholesale sales; showing place on Top 100 list.)

List #	Chain	100 List #	% Whsle	Address and Phone
1	Genuine Parts	3	70%	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700
2	Fisher Auto Parts	12	80	512 Greenville Ave., Staunton, VA 24401 (703) 885-8901
3	General Parts	14	80	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813
4	Parts Plus Autostore (Parts, Inc.)	16	65	601 S. Dudley, Memphis, TN 38104 (901) 523-7711
5	Sieg Auto Parts	17	95	400 N. Main St., Davenport, IA 52801 (319) 323-3641
6	APS (Big A Auto Parts)	19	66	3000 Pawnee St., Houston, TX 77054 (713) 741-2470
7	Stratco Inc.	21	70	POB 600, San Antonio, TX 78292 (512) 226-0101
8	Republic Auto	24	60	POB 2088, Brentwood, TN 37024 (615) 373-2050
9	Advantage Auto Stores (Hahn)	25	60	415 W. Main St., Rochester, NY 14608 (716) 235-1595
10	Parts Depot/Steego Auto Parts	26	60	2177 Dale Ave., Roanoke, VA 24013 (703) 345-1001

CHAINS WITH SERVICE

Last year we reported that there had been "a tremendous growth in the number of service bays in the ten largest chains which offer professional installation and repair..." This year, however, retrenchment in the face of the overall poor economy has taken its toll; chains have not been building stores with bays or adding bays to older ones to any great degree.

Indeed, the total number of bays reported by the chains which have significant presence in the service business has dropped by 661 bays—from 7,502 to 6,841 bays in all. We'll be watching these numbers closely to see if this suggests a trend away from chains offering service.

It should be noted that there's been a major added player to the list of chains with service, Gillman Auto Parts of Houston, which appeared on the overall Top 100 for the first time this year.

THE *AM* TOP TEN SERVICE PROVIDERS

(Based on number of service bays operated by each chain.)

List #	Chain	100 List #	Svc Bays	Address and phone number
1	Western Auto	5	3,185	2107 Grand Ave., Kansas City, MO 64108 (816) 346-4000
2	The Pep Boys	6	2,400	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000
3	PACCAR	15	600	1400 North 4th St., Renton, WA 98055 (206) 251-7600
4	WSR	8	168	9A Brickplant Rd., South River, NJ 08882 (908) 390-9000
5	Gillman Auto Parts	84	150	7611 Bellaire, Houston, TX 77036 (713) 776-7000
6	Quality Stores	30	100	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491
7	Champion Auto Stores	35	90	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 535-5984
8	VIP Discount Auto Center	63	69	12 Lexington St., Lewiston, ME 04240 (207) 784-5423
9	All-Car Automotive Centers	66	44	1520 S. Superior Ave., Antigo, WI 54409 (715) 623-3791
10	Stratco Inc.	21	35	POB 600, San Antonio, TX 78292 (512) 226-0101
	TOTAL BAYS		6,841	

TOP SPEED SHOPS

There are actually two more stores operated by the ten largest speed shop chains combined this year than there were on last year's list. In a time when most chains are closing stores or, at best, keeping their heads above water, that's a positive sign.

In all, however, there has been little action in terms of a change in chain names or the number of stores they operate between 1991 and 1992.

It's interesting to note that, while people tend to think of speed enthusiasts being concentrated in the South, the spread of speed shop locations—from Honolulu to Malden, MA, and from Newport Beach, CA, to Morningside, MD—indicates how widespread the hobby is. Indeed, only Seco Performance Centers is located in the traditional motor enthusiast area. There's money in selling to performance and appearance enthusiasts across the whole country.

THE *AM* TOP TEN SPEED SHOP CHAINS

(Showing percentage of retail sales)

List #	Chain	# of Stores	CEO, Address
1	Super Shops	162	Harry Eberlin, 620 Newport Center Dr., Ste 860, Newport Beach, CA 92660
2	Ben Pilla Speed Shops	28	Ben Pilla, 118 N. Black Horse Pike, Bellmawr, NJ 08031
3	Performance Centers of America	20	Donald Raleigh, 180 Whitman Ave., Edison, NJ 08817
4	Rons Auto Parts/Performance	7	Ronald Uemura, 2760 Kilihau St., Honolulu, HI 96819
5	Seco Performance Centers	5	John Simmons, 417 University Blvd., Birmingham, AL 35203
6	Speed Unlimited Inc.	5	Peter Mandes, 4771 Allentown Rd., Morningside, MD 20746
7	United Speed World	4	Terry Lewis, 734 W. Brandon Blvd., Brandon, FL 33614
8	Jeg's High Performance Centers	3	Ed Coughlin, 751 E. 11th St., Columbus, OH 43211
9	Van Iderstine Speed & Auto Center	2	Pete Van Iderstine, 245 Rt. 10, E. Hanover, NJ 07936
10	PV Performance Centers	2	Brian Peavey, 124 Eastern Ave., Malden, MA 02148
	TOTAL	238	

TOP IMPORT SPECIALISTS

With the ever-increasing number of foreign nameplates on the road, it would be reasonable to look for specialists in selling parts for these vehicles. Indeed, there are a number of chains which do specialize in parts for foreign nameplates. There are, however, fewer of these specialists than there are performance specialists, at least in terms of chains which own multiple outlets.

As may be expected, most of the import parts specialist chains are headquartered along either seaboard. There are none in the Great Plains states, where foreign nameplate vehicles are as rare as bison these days.

Interestingly, one chain on our list, headquartered in Texas, specializes in Japanese parts and accessories, while another, headquartered in Missouri, specializes in European parts and accessories. At least, that's what their corporate titles would indicate. Otherwise, the chains offer coverage of both Asian and European vehicle parts.

THE *AM* TOP TEN IMPORT SPECIALIST CHAINS

List #	Chain	# of Stores	$ Sales (+000)*	CEO and Address
1	Foreign Autopart Inc.	22	21,000	Steve Patkin, 1205 Route One, Sharon, MA 02067
2	Metro Imported Auto Parts	4	3,000	Bob Edwards, 4469 Beech Rd., Marlow Heights, MD 20748
3	Japanese Auto Parts	4	2,000	Bill Denny, 10711 E. Northwest Hwy., Dallas, TX 75238
4	Discount Import Parts Inc.	4	1,500	Bruce Marshall, 2704 E. 22d St., Tucson, AZ 85713-2006
5	Wip Imported Auto Parts	4	1,200*	William Lilly, 4225 Poplar Level Rd., Louisville, KY 40213
6	Foreign Machine & Parts	3	3,000	Al Walden. 3313 Jackson Ave., Memphis, TN 38122
7	European Car Parts	3	2,000	Larry Hatridge, 1015 McClausland Ave., St. Louis, MO 63117
8	Olympic Import Parts	3	3,000*	W. Michael Brown, 5168 Eisenhower Ave., Alexandria, VA 22304
9	Roger's Foreign & Domestic	2	2,000	David Murphy, 111 High St., Pottstown, PA 19464
10	Rally Import Auto Parts	2	960	Ken Niebling, 880 E. Oakland Park Blvd., Ft. Lauderdale, FL 33308
	TOTALS	51	37,660	